

BA Contacts Overview

This Job Aid provides an overview of the Benefits Administration Contacts page and provides guidance on how to update contact information. It is important to keep Benefits Administration Contact information current since notifications of Employee Self-Service updates to dependent information are only sent to the Benefits Administrator contact.

Note: Cardinal recommends using a shared email address or distribution list to allow for notifications to reach a broader group.

This Job Aid does not apply to employees participating in The Local Choice Health Benefits Program (TLC). Localities enrolled in TLC, please see the Job Aid titled **BN361_TLC Data Sheet Locality** located on the Cardinal website under **Learning**.

Table of Contents

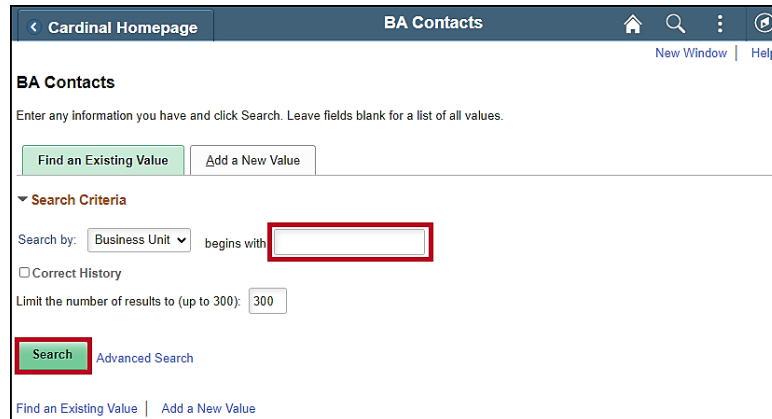
Editing BA Contacts	2
Adding a new BA Contact	5
Deleting an Existing BA Contact	9

Editing BA Contacts

1. To update the Benefit Administrator's contact information, navigate to the **BA Contacts** page by following this path:

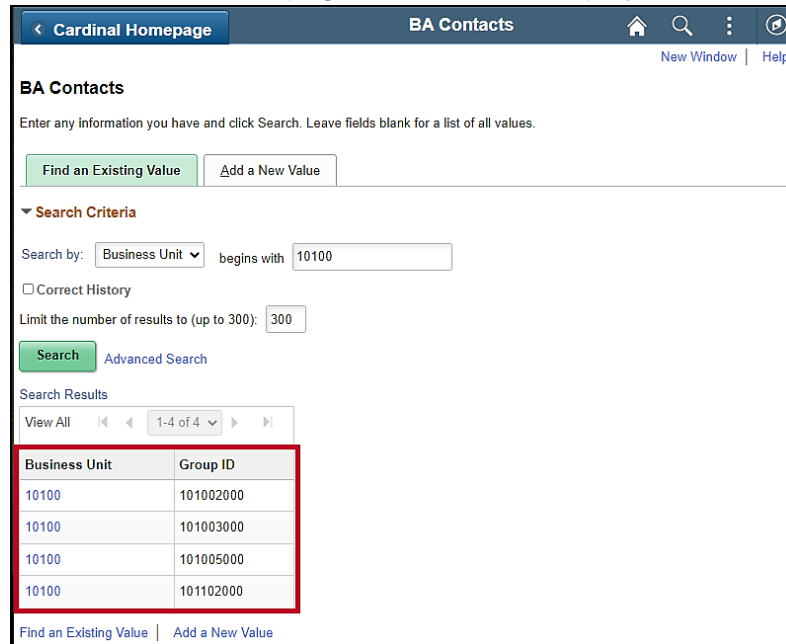
Navigator > Benefits > Employer Information > BA Contacts

The **BA Contacts Search** page displays.



2. Enter the Business Unit in the **Business Unit** field.
3. Click the **Search** button.

The **BA Contacts Search** page refreshes and displays the Search Results.

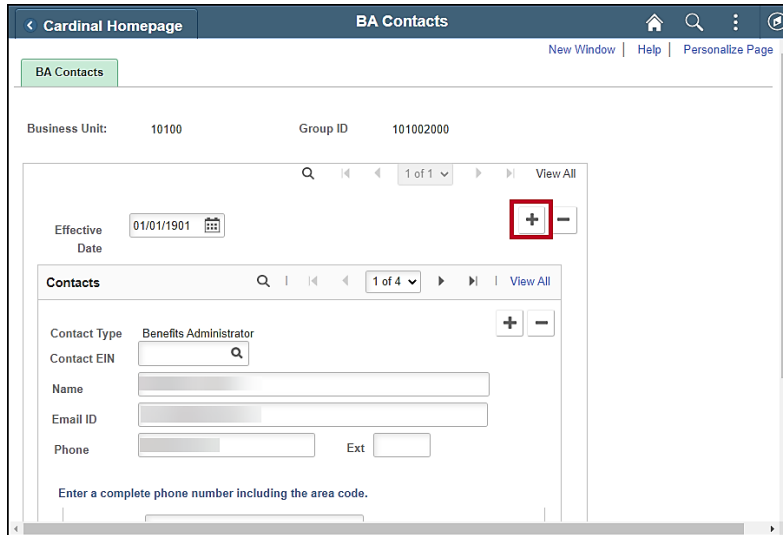


Business Unit	Group ID
10100	101002000
10100	101003000
10100	101005000
10100	101102000

4. Click the **Business Unit** link for the corresponding **Group ID**.

Note: Each **Group ID** must be updated individually.

The **BA Contacts** page displays.

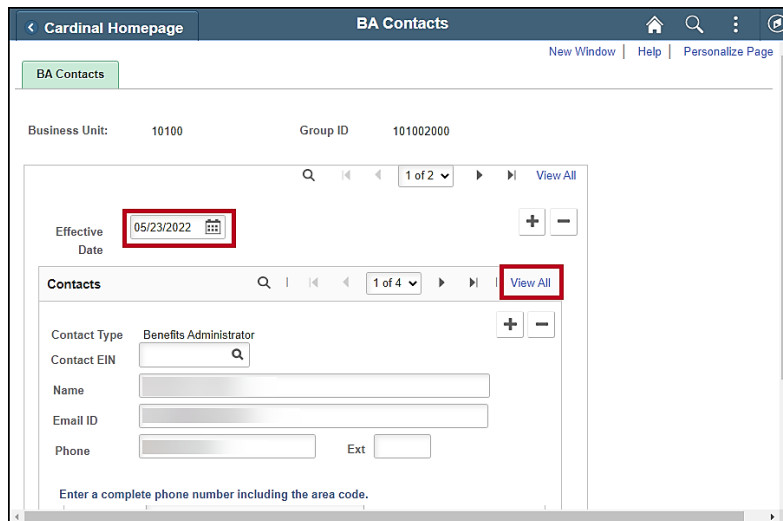


The screenshot shows the 'BA Contacts' page with the following details:

- Business Unit: 10100
- Group ID: 101002000
- Effective Date: 01/01/1901
- A red box highlights the **Add a Row (+)** icon next to the Effective Date field.
- The 'Contacts' section shows a search bar and a list of 1 of 4 contacts.
- The 'Contact Type' is set to 'Benefits Administrator'.
- Fields for Contact EIN, Name, Email ID, Phone, and Ext are visible.

5. Click the **Add a Row (+)** icon to add a new Effective Dated row.

The **BA Contacts** page refreshes.



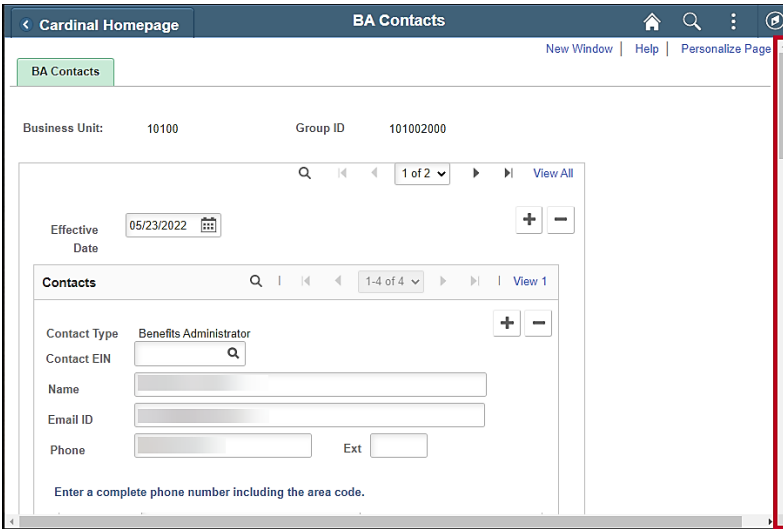
The screenshot shows the 'BA Contacts' page after adding a new row. The details are:

- Business Unit: 10100
- Group ID: 101002000
- Effective Date: 05/23/2022 (highlighted with a red box)
- The 'Contacts' section shows a search bar and a list of 1 of 2 contacts.
- The 'Contact Type' is set to 'Benefits Administrator'.
- Fields for Contact EIN, Name, Email ID, Phone, and Ext are visible.
- A red box highlights the **View All** link next to the list of contacts.

Note: The **Effective Date** defaults to the current system date and can be edited.

6. Click the **View All** link.

The **BA Contacts** page refreshes.



Cardinal Homepage BA Contacts

Business Unit: 10100 Group ID: 101002000

Effective Date: 05/23/2022

Contacts: 1 of 2

Contact Type: Benefits Administrator

Contact EIN: [Search]

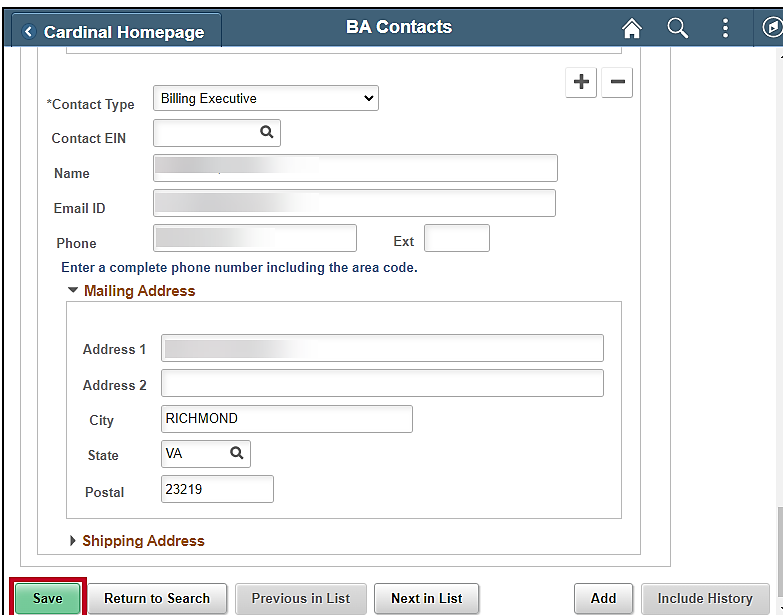
Name: [Text Box]

Email ID: [Text Box]

Phone: [Text Box] Ext: [Text Box]

Enter a complete phone number including the area code.

7. Scroll down the **BA Contacts** page to the **Contact Type** that requires an update.
8. Edit and update BA Contact information as needed.



Cardinal Homepage BA Contacts

*Contact Type: Billing Executive

Contact EIN: [Search]

Name: [Text Box]

Email ID: [Text Box]

Phone: [Text Box] Ext: [Text Box]

Enter a complete phone number including the area code.

▼ Mailing Address

Address 1: [Text Box]

Address 2: [Text Box]

City: RICHMOND

State: VA [Search]

Postal: 23219

► Shipping Address

Save Return to Search Previous in List Next in List Add Include History

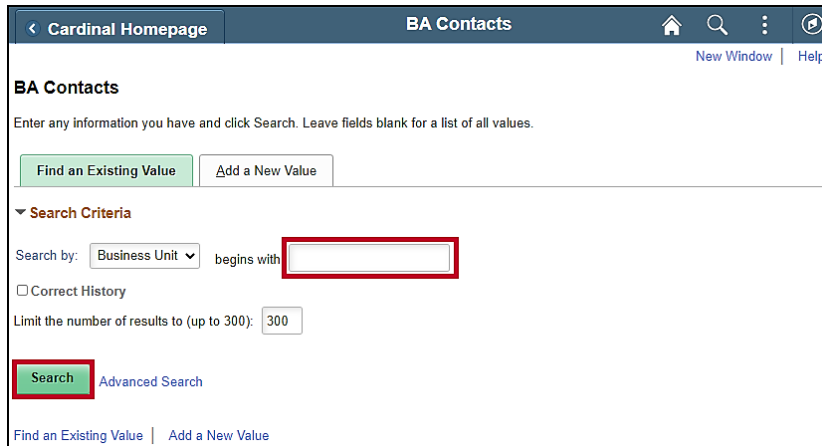
9. Review all the BA Contact details.
 10. Click the **Save** button at the bottom of the page.
- If there are additional BA Contact updates needed for other Group IDs, click the **Return to Search** button.

Adding a new BA Contact

1. To add a new BA contact, navigate to the **BA Contacts** page by following this path:

Navigator > Benefits > Employer Information > BA Contacts

The **BA Contacts Search** page displays.



BA Contacts

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Search by: **Business Unit** begins with

☐ Correct History

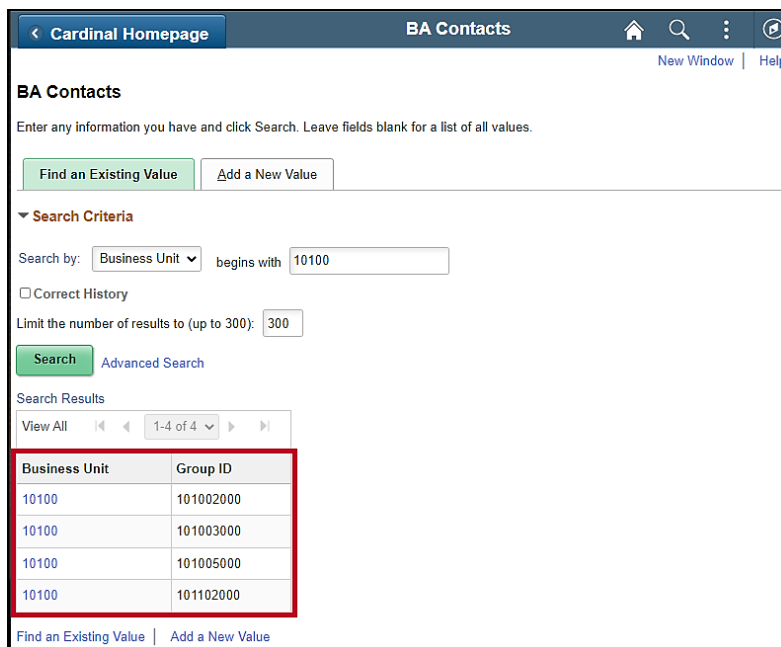
Limit the number of results to (up to 300):

Search [Advanced Search](#)

[Find an Existing Value](#) [Add a New Value](#)

2. Enter the Business Unit in the **Business Unit** field.

The **BA Contacts Search** page refreshes and displays the search results.



BA Contacts

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Search by: **Business Unit** begins with

☐ Correct History

Limit the number of results to (up to 300):

Search [Advanced Search](#)

Search Results

View All

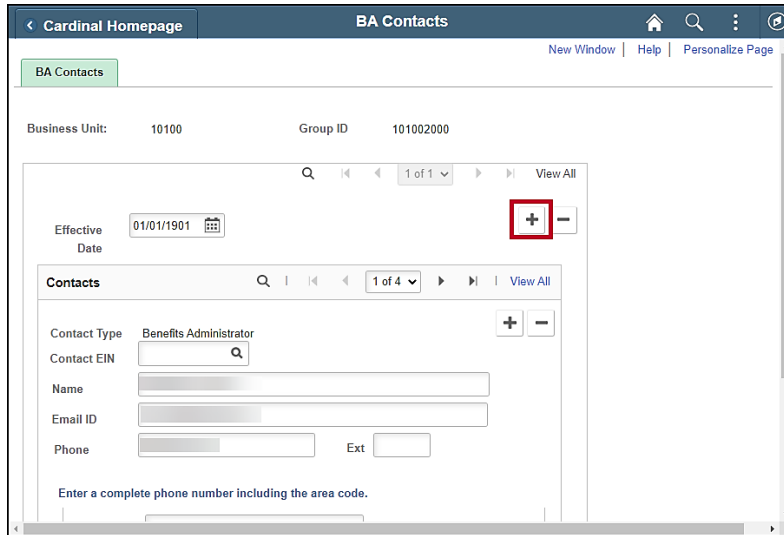
Business Unit	Group ID
10100	101002000
10100	101003000
10100	101005000
10100	101102000

[Find an Existing Value](#) [Add a New Value](#)

3. Click the **Business Unit** link for the corresponding **Group ID**.

Note: Each **Group ID** must be updated individually.

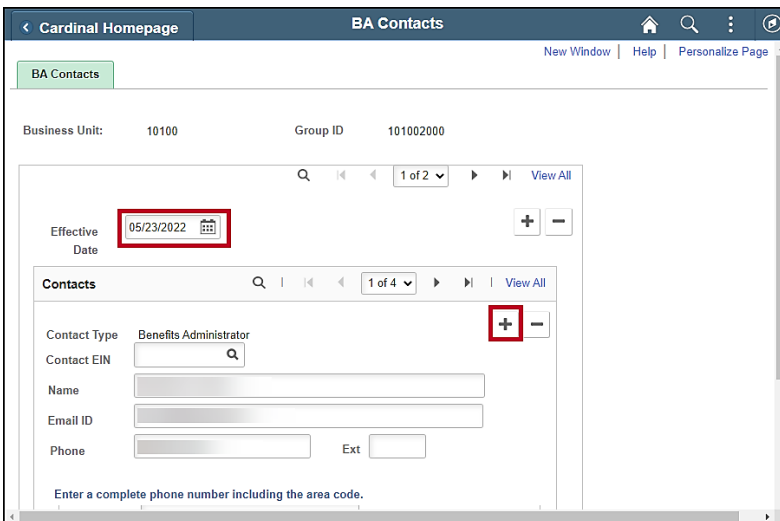
The **BA Contacts** page displays.



The screenshot shows the 'BA Contacts' page in a web browser. The page has a header with 'Cardinal Homepage' and 'BA Contacts'. Below the header, there are tabs for 'BA Contacts', 'New Window', 'Help', and 'Personalize Page'. The main content area displays 'Business Unit: 10100' and 'Group ID: 101002000'. There is a search bar and a 'View All' link. Below this, there is a section for 'Effective Date' with a calendar icon and a red box around the '+ -' icon. The 'Contacts' section below it has a search bar, a 'View All' link, and a red box around the '+ -' icon. The 'Contacts' section contains fields for 'Contact Type' (Benefits Administrator), 'Contact EIN', 'Name', 'Email ID', 'Phone', and 'Ext'. A note at the bottom says 'Enter a complete phone number including the area code.'

4. Click the **Add a Row (+)** icon to add a new Effective Dated row.

The **BA Contacts** page refreshes.

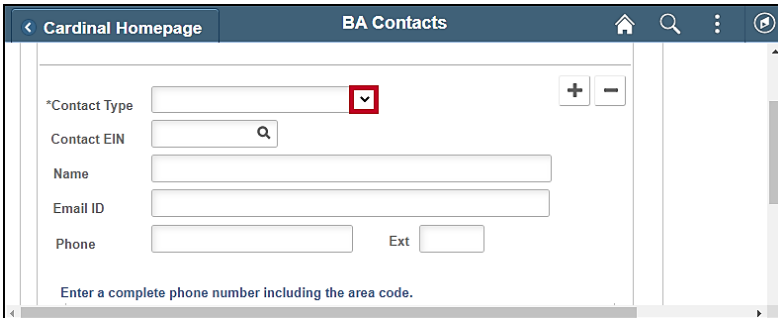


The screenshot shows the 'BA Contacts' page after a refresh. The 'Effective Date' section now displays '05/23/2022' with a calendar icon, and a red box is around the '+ -' icon. The 'Contacts' section remains the same with its search bar, 'View All' link, and red box around the '+ -' icon. The 'Contacts' section contains fields for 'Contact Type' (Benefits Administrator), 'Contact EIN', 'Name', 'Email ID', 'Phone', and 'Ext'. A note at the bottom says 'Enter a complete phone number including the area code.'

Note: The **Effective Date** defaults to the current system date but can be edited.

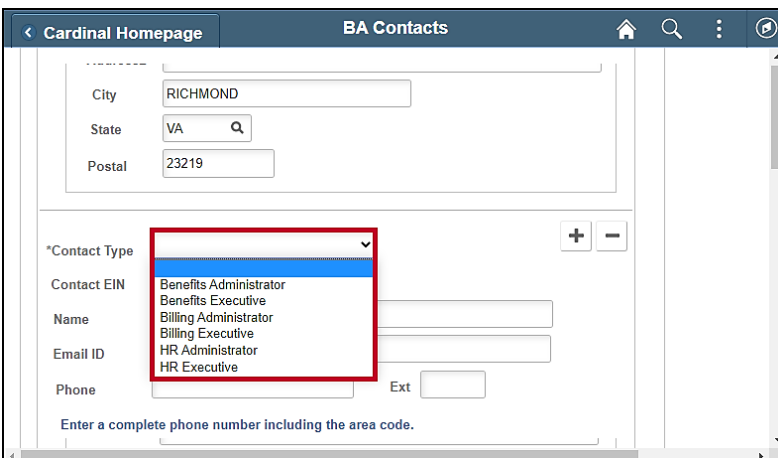
5. Click the **Add a Row (+)** icon to add a new Contact Type.

The **BA Contacts** page refreshes.



The screenshot shows the 'BA Contacts' form. At the top, there are tabs for 'Cardinal Homepage' and 'BA Contacts'. Below the tabs, there is a search bar and a list of fields: '*Contact Type' (with a dropdown arrow), 'Contact EIN' (with a search icon), 'Name', 'Email ID', 'Phone', and 'Ext'. A red box highlights the '*Contact Type' dropdown menu.

6. Click the **Contact Type** dropdown button.



The screenshot shows the 'BA Contacts' form with the '*Contact Type' dropdown menu open. The dropdown menu lists the following contact types: Benefits Administrator, Benefits Executive, Billing Administrator, Billing Executive, HR Administrator, and HR Executive. A red box highlights the dropdown menu.

7. Select the applicable **Contact Type** by clicking the corresponding list item.

Note: There are six types of contacts, and each Contact Type is limited to one contact.

- The Benefits Administrator is the only required contact and is the only contact who receives email notifications of updates made to dependent information through Employee Self-Service (ESS).

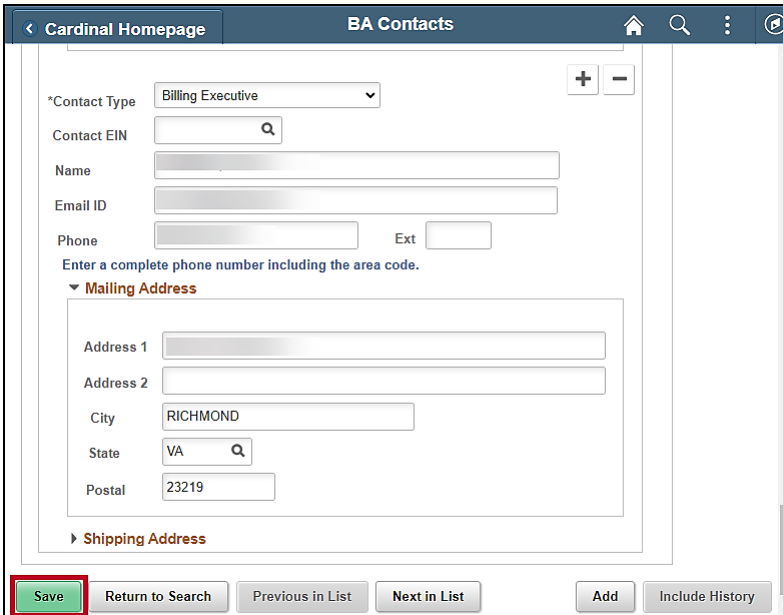
Note: Cardinal recommends a shared email address or distribution list to allow for notifications to reach a broader group, if appropriate.

- The Benefit Administrator, Benefit Executive, Billing Administrator, and Billing Executive contact details are reported to DHRM.
- The HR Administrator and HR Executive contacts are for informational purposes in Cardinal.

8. Enter the BA Contact information.

If the **EIN** (employee ID number) is entered, the employee's **Name**, **Email ID**, and **Phone** fields will automatically populate.

Note: If a shared email address is being used the **Name**, **Email ID**, and **Phone** fields must be entered manually and the **EIN** should not be entered.



Cardinal Homepage BA Contacts

*Contact Type: Billing Executive

Contact EIN: [Search]

Name: [Text]

Email ID: [Text]

Phone: [Text] Ext: [Text]

Enter a complete phone number including the area code.

▼ Mailing Address

Address 1: [Text]

Address 2: [Text]

City: RICHMOND

State: VA [Search]

Postal: 23219

► Shipping Address

Save Return to Search Previous in List Next in List Add Include History

9. Click the **Save** button at the bottom of the page.

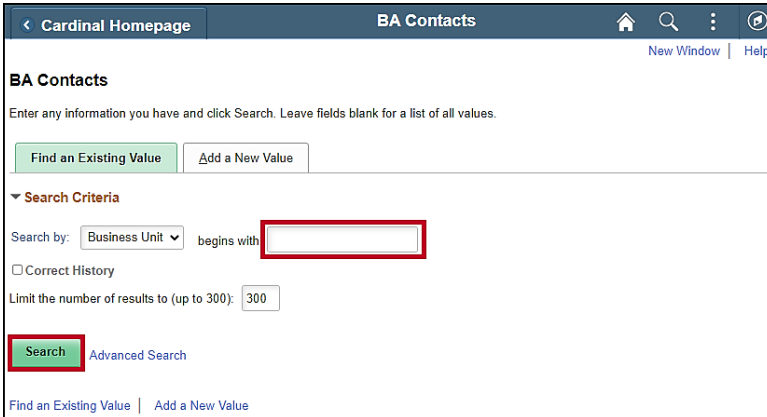
If there are additional BA Contact updates needed for other Group IDs, click the **Return to Search** button.

Deleting an Existing BA Contact

1. To delete an existing BA contact, navigate to the **BA Contacts** page by following this path:

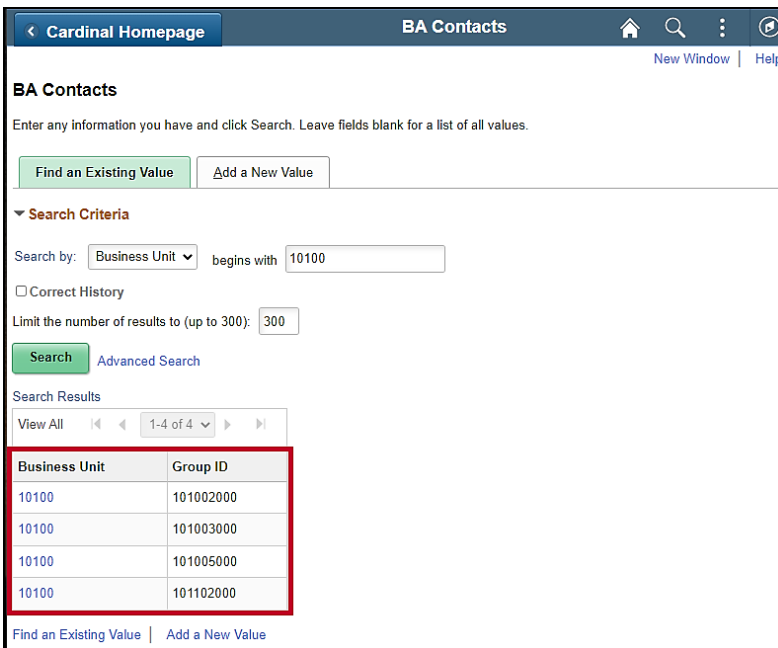
Navigator > Benefits > Employer Information > BA Contacts

The **BA Contacts Search** page displays.



2. Enter the Business Unit number in the **Business Unit** field.
3. Click the **Search** button.

The **BA Contacts Search** page refreshes and displays the search results.

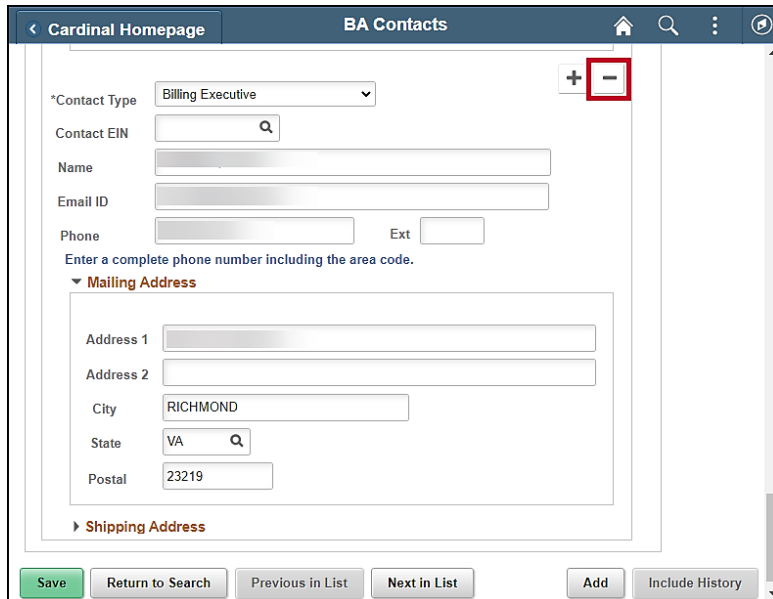


Business Unit	Group ID
10100	101002000
10100	101003000
10100	101005000
10100	101102000

4. Click the **Business Unit** link for the corresponding **Group ID**.

Note: Each **Group ID** must be updated individually.

The **BA Contacts** page displays.



5. Click the **Delete a Row (-)** icon in the corresponding row to delete a BA Contact.

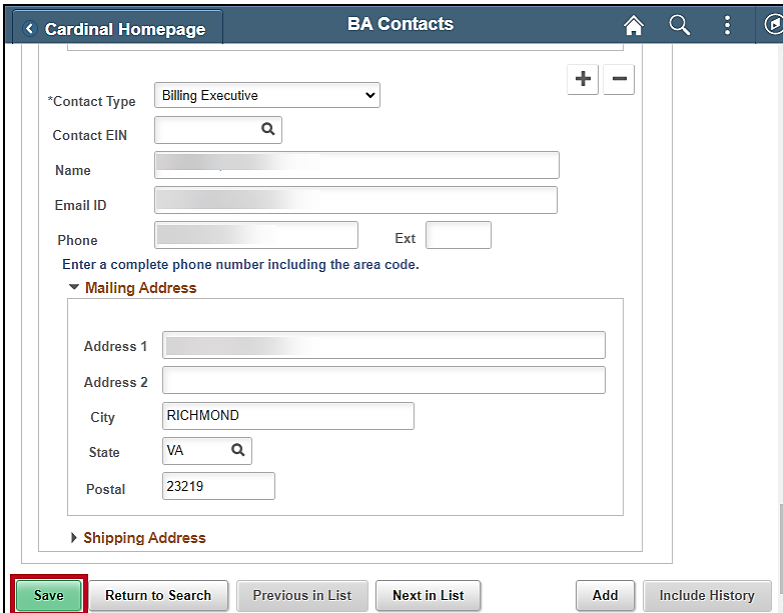
Note: The Benefits Administrator contact is required and cannot be deleted, however the Benefits Administrator contact information can be edited.

A confirmation message displays.



6. Click the **OK** button.

The **BA Contacts** page refreshes.



The screenshot shows the 'BA Contacts' form in the Cardinal system. The form is titled 'BA Contacts' and includes fields for Contact Type (Billing Executive), Contact EIN, Name, Email ID, Phone, and Ext. It also has sections for Mailing Address (Address 1, Address 2, City, State, Postal) and Shipping Address. The Save button is highlighted with a red box.

7. Click the **Save** button at the bottom of the page after making all necessary updates to the **BA Contacts** page.

If there are additional BA Contact updates needed for other Group IDs, click the **Return to Search** button.